Preservation Training for Facilities Managers and Staff

Princeton University, Princeton NJ * October 27-29, 2003



Preservation Training for Facility Managers & Staff

WELCOME TO PRINCETON & THE PRESERVATION TRAINING CONFERENCE WILLIAM TRAUBEL, Director of the Grounds and Building Maintenance Department at Princeton University, welcomed 30 conference attendees to the first of two Preservation Training for Facility Managers & Staff Conferences. Bill described how he and other facilities managers recognized the need for preservation training at the first Congress of National Historic Landmarks stewards in the Northeast held six years ago at West Point. He warmly welcomed fellow facility managers to Princeton to learn from the conference speakers and one another. Throughout the first day of the Conference, Bill used the historic resources of Princeton's campus as concrete examples of the challenges facing him and his peers at other institutions. The challenge for all is to protect the integrity of historic resources

in institutions whose primary mission is not historic preservation.



Preservation Training for Facilities Managers and Staff is a collaboration between the National Park Service's Northeast Region and the Presidio Trust. The first of two pilot workshops was hosted by Princeton University, home to four National Historic Landmarks, October 27-29, 2003. It was funded through the Director of the National Park Service's Challenge Cost Share Program and supported by regional NPS funds. Challenge Cost Share matching requirements were met through the donation of time and expenses of partners' organizations who were critical to the workshop's success.

A second Preservation Training will be held on April 26-27, 2004 at The Presidio in San Francisco. For more information visit www.nps.gov/nero/presidio or call Lisa Kolakowsky Smith at (215) 597-7946.





pass American architectural history from its Georgian roots to today's construction.

Despite the rain, participants eagerly engaged in issues such as ivy and pigeons; falling

lenge of providing modern HVAC comfort. Princeton was ideal as site turned classroom.

slate tiles and acid rain impacted monuments; the tedium of repointing and the chal-

DAVID HOLLENBERG, Associate Regional Director of the National Park Service's Northeast Region, welcomed the group on behalf of the National Park Service. David expressed the National Park Service's excitement to be part of this first workshop for institutional National Historic Landmarks' facilities managers. He reminded the participants that legally the National Landmarks are equivalent in stature to the National Parks; they are designated as our most significant National historic sites. David conveyed the appreciation the National Park



Service has for the difficult job those in the room and others like them have. It is not easy to balance institutional mission and preservation of of historic resources. There is though a powerful connection with the past when institutions succeed in the balancing act especially when an institution can sustain the original use. He pointed to the example of the meeting room used for the morning's session. Albert Einstein once taught in the same classroom with his students sitting in the same seats.



S. Elizabeth Sasser, AIA, National Park Service. Project Manager with the Architectural Preservation Division of the Northeast Region.

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The Princeton Conference Participants-Represented:

7 Universities, Colleges, Schools

- 7 National Park Service Sites
- **4 Historic Districts**

(including 2 Shaker Villages)

- **4 State and County Park Sites**
- 3 Interpreted Sites
- 2 State Historic Preservation Offices
- 1 U.S. Forest Service Site
- 1 Non-Profit Shelter

Worth Repeating:

Maintenance <u>Is</u> Preservation Lisa Sasser

INTRODUCTIONS AND PRINCIPLES OF HISTORIC PRESERVATION

LISA SASSER, a National Park Service Historical Architect, led the 30 conference attendees, conference speakers and staff attending the opening session in introductions. She encouraged everyone to tell a bit about themselves and describe what they hoped to learn from the training. As attendees described their work and the challenges they face some commonalities were striking.

All are grappling with day-to-day maintenance. One participant described his institution as having 'taken deferred maintenance to a new level'. He was echoed by many who joined in hoping to take from the conference some resourceful ways to keep on top of constant maintenance needs.

Many attendees are lone stewards or nearly so for their sites. They were looking to learn from other stewards as well as the speakers.

Several are grappling with major structural issues. As one participant described his landmark, "it is in sad shape" and "needs alot of work'.

Frequently, well-intentioned but uninformed treatments have exacerbated maintenance problems. An example given was the use of portland-based mortar rather than the original lime-based formulation. Conference attendees looked to learning how to do maintenance right so not to have to do it over.

Generally, participants were not historic preservationists by training. One participant verbalized her desire to 'get some buzz words' to assist in appropriately preserving her historic landmark. Another described herself as 'novice to all this' and looked forward to learning from the group.

Most are trying to do their work on shoe string budgets. Many verbalized their hope to find an affordable way to do things right.

None characterized their National Historic Landmarks as burdensome. The landmarks were instead cherished by these facility managers and staff despite all too often being extremely challenging.

WHY PRESERVE?

Lisa posed the question, why preserve? Her audience suggested that preservation helps educate us; orients us in place and time; preserves aesthetics we value; connects us to our national heritage. Given the value of preservation how do we treat historic buildings? Lisa suggested that one treatment is neglect. Lisa observed when building are not maintained "it is amazing how quickly they recede into the earth." She then described the rest of the world talking about conservation. In the United States we talk about preservation. "It sound like pickling". In fact this is one approach sometimes used. Buildings can be 'mothballed' to keep from losing them until such time as the money and technology exist to make them accessible again. For more information, see Sharon Park's Preservation Brief online at http://www2.cr.nps.gov/tps/briefs/brief31.htm.

If not mothballing, then what?

- 1. Document the history of our significant resources. We need to under stand the changes buildings have gone through, how events have changed the property and the links to significance.
- 2. Carry on maintenance; maintenance IS preservation.
- 3. Use one of the four historic preservation treatments defined in the Secretary of Interior's Standards for Historic Preservation: Preservation, Restoration, Rehabilitation, Reconstruction.

How Much to Save the Cat?

Lisa advised the group that ideally, buildings that have deteriorated should have the missing elements repaired or replaced in kind; they should be <u>restored</u>. However, she acknowledged the realities faced by building stewards. Preservation is like dealing with a veterinarian. While the procedures used on humans are feasible for animals too, ultimately a decision must be made of 'how much will you spend to save the cat'. Stewards must work within constraints. What is reasonable? What is feasible? What is affordable?

Lisa posited that the most usual answer for institutionally owned buildings is to maintain, <u>preserve and/or restore</u>, the visual appearance of the exterior while <u>rehabilitating</u> the interior for contemporary uses. To see the Standards for Rehabilitation with some illustrated examples visit http://www2.cr.nps.gov/tps/tax/rhb/. To learn about other appropriate treatments visit: http://www2.cr.nps.gov/tps/ standguide/index.htm.

IN THEORY AND IN PRACTICE

Lisa Kolakowsky Smith, Architectural Historian with the National Park Service Northeast, Preservation Assistance Group, described the steps in the process that are essential for successful rehabilitations of historic properties.

Research-Institutions are unlikely to preserve what is important about their property until the history of the property within its social and historical context is known. Lisa described what she has learned working with National Historic Landmarks. "Many stewards have never seen their National Historic Landmark nomination." National Historic Landmarks have generally been studied in considerable depth as part of the process of determining eligibility for National Historic Landmark status. The National Park Service has these studies. Almost all National Historic Landmarks have National Register nomination documentation as well. This rich trove of resource documentation is available from the State Historic Preservation Office in the State where the historic property is located. Lisa encouraged those undertaking any rehabilitation or other preservation treatment to begin by familiarizing themselves with these and their institution's own records. To contact the National Park Service go to: http://www.cr.nps.gov/ nhl/regions.htm. To find the State Historic Preservation Office in your State go to: http://www.ncshpo.org/stateinfolist

Evaluate-The character defining features should be identified. This is a three-step process. First, identify the buildings overall visual aspects such as scale and verticality. Next, identify the visual aspects of the exterior such as the stonework prevalent on the Princeton campus. Finally, identify any interior aspects such as murals in the Croatian church or spiral stairwell shown in the photos below.

Assess and Plan-Lisa concluded by guiding the group through the Secretary's Standards for Rehabilitation. She recommended that these be used to assess what actions are needed and to plan appropriate treatments for historic structures. You can find the Standards at: http://www2.cr.nps.gov/tps/standguide/rehab/rehab_standards.htm Lisa's entire powerpoint presentation is available online as part of the 'virtual' conference at www.nps.gov/nero/princeton.

Lisa Sasser's Book Recommendation: How Buildings Learn by Stewart Brand

In the book the author considers the characteristics a building must maintain for people to want to keep it.

Lisa Sasser's conference handouts and all of the other conference workshop materials that were made available electronically are part this post-conference website.

http://www.nps.gov/nero/princeton



Lisa Kolakowsky in collaboration with Julianne Polanco was conference organizer for this conference. Lisa is also the primary contact for Challenge Cost Share grants and works with the Save America's Treasures Grant program for National Historic Landmarks. She has also just completed coordinating the first national NHL photo contest. To learn more visit:

www.nps.gov/phso/nhlhome.htm and www.nps.gov/phso/nhlphoto

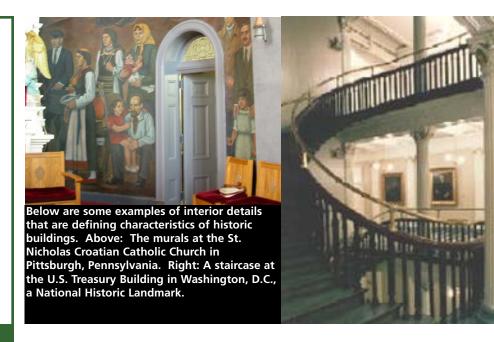
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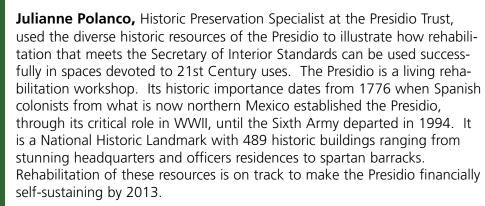


Julianne Polanco is Senior Project Manager for the Presidio Trust. Her current projects include the rehabilitation of Victorian-era residential structures for office use and the restoration of a turn-of-the-century sandstone wall that marks the perimeter of the 1400 acre Presidio. Julianne will host the second Preservation Training for Facilities Managers at the Presidio in April.

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Building 39 shown below was just one example of the creative reuses of Presidio properties. The San Francisco Film Center has made it their head-quarters. This is joined by rehabbed residential spaces ranging from the large elegant house on the bottom right to modest apartments that are within walking distance of office complexes and a museum. It all makes for a unique park that incorporates historic preservation, environmental sustainability, and new technologies in a private-public partnership. Learn more at: www.presidio.gov or come to the second Preservation Training for Facilities Managers and Staff Conference at the Presidio on April 26-27, 2004.





SUSTAINING HISTORY

MARK KOENINGS, Commissioner, National Parks of New York Harbor, told attendees that he believes linking sustainability and historic preservation is the most important strategy for the future, particularly for our young people. Yet, we have not seized the practice as a nation. As Americans we are 5% of the world's population but consume 25% of the world's resources. Asia and the Indian subcontinent are home to 2.5 billion people. To the extent they succeed in emulating us, the effect on world resources will be devastating. The New York Parks are taking a leadership role in sustainable practices through practical applications. Mark pointed to the National Park Service's mission 'to leave the parks unimpaired for future generations' as ample reason to make these efforts an integral part of New York Parks operations.

A MODEL FOR MEGACITIES

There are now 38 megacities worldwide. These are urban centers of 15 million or more people. The New York Parks, a part of our only megacity, are a living laboratory for the rest of the world. In the 27,000 acres designated part of the National Park System in New York City, you can order pizza delivered on your cell phone as you catch stripped bass in Jamaica Bay while viewing the Manhattan skyline. Nature is within reach here.

What Does this Have to Do with Preservation?

Rehabilitation of historic structures is a natural part of sustainability. Structures reclaimed, reused, and recycled spare the environment the impacts of producing and distributing new materials. In the New York Parks this is coupled with making buildings "green". Microturbines have been an important part of this effort. Five of these have been installed. They are the size of a refrigerator, can generate between 25 and 500 KW with energy efficiency of 80 percent. One unit can run a large WalMart store. See www.eere.energy.gov/der/microturbines/microturbines.html for the Department of Energy's description of microturbines.

Mark told the group that by doing just three things we can individually and collectively have an enormous impact on the environment:

- 1. Do whatever we can do to reduce carbon emissions: drive less; increase fuel efficiency; reduce energy use in buildings.
- 2. Minimize water used and wasted
- 3. Avoid toxic materials

The Commissioner contends we are too stovepiped. He gave solvent use as an example. Solvents are almost as devastating to the environments as carbon derivatives. As historic buildings are rehabbed and maintained, thoughtless choices of the solvents used to clean metal roofs or stonework critically impact the environment. Facility managers' decisions make a difference.

Mark concluded by describing his vision of a New York City learning institute which changes people's buying habits. People would go to Walmart and buy differently because they would understand that what one buys impacts Jamaica Bay in their own neighborhood.

To learn more about the National Parks of New York Harbor: www.nps.gov/nycparks/

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Mark Koenings, General Superintendent of Gateway National Recreation Area was recently appointed Commissioner of the National Parks of New York Harbor. He has forged a national effort to make the National Park Service a leader in sustainable practices and in addressing global climate change.

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SEEING IS BELIEVING

BILL TRAUBEL, Director of Grounds and Building Maintenance, Princeton University, **MICHAEL DENCHAK,** Architect, Princeton University and **MICHAEL MILLS,** Principal, Ford, Farewell, Mills and Gatsch Architects treated the participants to two tours of the Princeton campus that provided concrete examples of historic preservation in a 21st century institutional setting.

CAMPUS TOUR

Bill Traubel kept his tour group enthralled despite rain showers and occasional downpours. As Director of Grounds and Building Maintenance, Bill





faces the day-to-day challenges of preserving historic resources dating to the 18th century while keeping students and faculty comfortable, safe, and capable of utilizing 21st Century technologies. The tour continuously demonstrated the difficulties Princeton faces and provided participants practical solutions to meet their own institutional needs. Participants gazed at more than twenty buildings

that provided insights into maintenance of their own facilities. Some of the practical issues discussed are illustrated in the four photos shown. At McCosh Hall managers were shown the HVAC vent through the old original glass. This provides an alternative to window air conditioning units or duct work that covers interior ceiling detail. The University is considering coloring the vents to make them even more inconspicuous. At McCosh Hall Princeton is also wrestling with treatment of moss on their famous lions. They are leaning towards leaving them untreated for fear treatment may leave the lions more suspectible to water and other atmospheric damage. The balustrade system on the bottom left is a typical example of the practical information Bill Traubel provided the participants. Princeton has





replaced the original wood tooled balustrade with factory molded ones. Stripping, sanding, and painting wooden ones was very labor intensive and, therefore, correspondingly very expensive. The artificial ones while initially pricey are by comparison virtually carefree. This is a compromise between doing away with the 'look' entirely and keeping wooden ones. The sundial on the bottom right is another example of the difficulty caretakers face in maintaining his-

toric properties. Acid rain is eating away the detail. This, of course, is not something Princeton can control alone but typifies the challenges faced by facilities managers.

CHANCELLOR GREEN/EAST PYNE BUILDING TOUR

Michael Denchak and Michael Mills guided participants on a tour through Chancellor Green and the East Pyne Building. The East Pyne Building was first on the tour. Built as a library in 1897, the building had been converted to administrative offices and its present use as the Foreign Languages Department. The rehabilitation was needed to increase classroom space and update office technology. Along with the rehab work, participants were shown the new basement level constructed to supply more space while not taking away from the original character of the building. It now contains a computer room, offices, and a new auditorium with all the latest technology.

The second building on our tour was the Chancellor Green Library and Reading room built in 1870. This building is an architectural gem with





Michael Denchak introduced participants to his firm's work on the Chancellor Green project. The tour took the group to the see the spectacular dome that looks in the photo above the way visitors would see it. The facilities managers also visited the work in progress as shown on the right. Next stop was East Pyne, pictured below where the group gazed at windows that are beautiful and maintenance intensive from both the inside and the outside.

most of its original character intact. Much had been covered up over time and is now being restored. The current project managers showed us many of their great architectural finds while working on the building.



Conference Participants Continued

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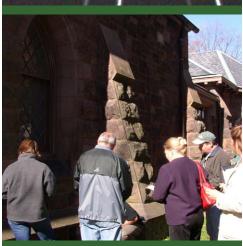
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UNDERSTANDING YOUR BUILDING

JOHN SANDOR, Historic Architect from the National Park Service, gave a mini-course on doing a condition assessments using Edna St. Vincent Millay's Steepletop as an example.

LIKE SEEING YOUR PRIMARY CARE PHYSICIAN

John used the analogy of seeing your primary care physician as he initiated the group into the condition assessment construct. It is:

- Akin to a medical checkup for your building
- ♦ Used to identify problems, large or small
- ♦ If necessary, contact a specialist for a specific problem or a second opinion to complete the diagnosis

A condition assessment is a document that is frequently just a starting point for subsequent documents such as a maintenance plan, rehabilitation schedule/prioritization or a historic structures report.

How to Do a Condition Assessment

John emphasized the important of designing a condition assessment to meet the needs of the specific resource. A cookie cutter approach is unlikely to be successful. Each property has its own challenges and idiosyncrasies. A good assessment must take these into account.

The basic process has three-steps.

- Record Observations-approach recordation in a systematic manner by organizing the assessment by spaces, elevations, features, etcetera.
- 2, **Specific Recordation**-inventory of materials, record problems (primary and secondary)
- 3. **Provide Recommendations**-ensure they are in character with the resource, are feasible, can be implemented and evaluated.

John suggested that a basic approach to use would be the model created by Georgia Tech University. You will find those components and their application to the St. Vincent Millay property used as an example at www.nps.gov/nero/princeton/condition.htm.

DOING A CONDITION ASSESSMENT

The group discussion focused largely on compromise solutions and acceptable alternatives. It is important to identify areas the areas of flexibility and distinguish them from features critical to a property's significance. John emphasized that those features should not be compromised. With that thought in mind the group launched into a condition assessment for Murray Hall. It proved to be an extremely valuable experience in identifying significant features and general conditions as well as defining priorities. The participants brought diverse backgrounds and skills that allowed everyone to contribute. With the roof plan, elevation, and short history provided, Murray Hall proved to be ideal for the exercise. The building was small enough to accomplish the task in the time allocated.

Top to Bottom: John Sandor, historical architect engages attentive audience with and without a powerpoint presentation. His architectural training and historic preservation prowess were tested as he created an entire brick edifice to adapt the existing interior space to 21st Century use. After John provided his mini course in conditions assessment the group applied it to Murray Hall in an afternoon field exercise.

IN DEPTH: OPEN SESAME

Bill Brookover, Historic Architect from the National Park Service, Northeast Region provided the attendees with an overview of appropriate treatments of historic windows. **Amy Floresta** and **Sam Robinson** of Kiernan Timberlake Associates followed with a case study focused on the Cope and Stewardson building. Wrapping up this session overflowing with practical information, **Jim Hicks**, pictured below, both demonstrated window restoration and gave the group a chance to gain hands-on experience.



In Depth: Keeping it Together-Lisa Sasser, Architect from the National Park Service, Northeast Region provided the attendees with an overview of mortar maintenance, repair, and replacement. Charlie Culbertson and Frank Yurick of Elite Restoration followed with a masonry demonstration. The group got some hands-on experience as they learned the intricacies of re-pointing a garden wall on the Princeton campus. They learned how to match mortar color and the correct amounts of limestone, water, and cement to mix. After the demonstration Frank Yurick gave a tour around the Princeton campus pointing out the projects they have worked on as well as the different pointing techniques they used. They discussed different aspects of masonry and how to hire masons following the tour.





Amy Floresta and Sam Robinson of Kiernan Timberlake Associates took the the Open Sesame session outside to give the group a glimpse of the work their firm is doing.



The hands-on aspects of the workshop made this workshop different from the usual conference and contributed greatly to its success. Charlie Culbertsonabove demonstrates masonry repair for the group.

More materials for the in-depth sessions are available as part of the post-conference materials at: www.nps.gov/nero/princeton.



WORTH REPEATING:

Frank Wong pictured above used the following quote as sound guidance to all those who must balance historic preservation with other institutional needs.

The pessimist complains about the wind; the optimist expects it to change; and the realist adjusts the sails.

William Arthur Ward

Conference Attendees Continued

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THE BIG PICTURE

Peter Primavera, President, Cultural Resource Consulting Group and **Frank Wong**, Director, Physical and Capital Planning, Rutgers University challenged attendees to think beyond crisis management and develop a master plan for the management of historic resources. Peter Primavera led off and described the work his firm has been doing with Rutgers University. to make historic resources a part of their integrated planning process. Frank Wong followed by describing the Rutgers case in some detail. Rutgers' is integrating the treatment of their 13 National Register properties and Old Queens, their National Historic Landmark into the Rutgers Strategic Planning process. The university staff have actively collected a great amount of historic information, taken into account the contributions of famous people such as alumnus, Paul Robeson, and have made the rich history of the University part of the 2003 Master Plan.

THE PLANNING PROCESS PIECES

The Rutgers planning process includes the following specifics:
A Resource Inventory
GIS Database
Integrated Project Planning
Design and Technical Standards
Facilities Condition Analysis
Community Outreach

Beyond these paper products training staff in the appreciation and care of historic resources may have been the most important. However, according to Frank there has been a change in mindset at the top as well. In the past, the resources available for historic resources were for maintenance. The administration has come to appreciate what an asset being a colonial era college can be. There is an awakening both at the University and in New Brunswick that the historic resources of New Brunswick can be important to the quality of life to the university community, townspeople and the citizens of New Jersey.

AN OUNCE OF PREVENTION

Curt Genga, Properties Director, The Preservation Society of Newport County, and **Annabelle Radcliffe-Trenner**, Principal Architect, Historic Building Architects, LLC guided the group through issues of maintenance management.



The 33 buildings on the 88 acres of the 'cottages' at Newport, The Breakers above is an example are a herculean maintenance challenge. Curt Genga described for the group the database they use to project out the \$100,000,000 of expenditures that will be needed over a 30 year time horizon in Newport. The electronic database they use called Facilities Management System is a product of McGinley, Hart, and Associates LLP. They keep a finer level of detail for monies to be spent in the near-term than in the out-years.

BEFORE THE FACITITIES MANAGEMENT SYSTEM

Kurt described what they did before using an electronic database:
Budgets were time consuming
Information in Curt's head
No consistency
Settled for which ever contractors were available
Not capable of identifying highest needs

Now they are able to:

Budget at the push of a button Information is in database Board is on schedule Obtain quality contractors View schedule for 1 to 30 years Fundraising for future projects

Preservative Maintenance Critical

All builidings and materials have an expected useful life and must be replaced and maintained periodically. Curt showed the group a picture of a roof leak and the interior damage. As he described it, a 5 cent leak and 20 K in damage. The facilities management system has allowed them to manage their resources proactively. This has both improved quality and saved money.

Annabelle Radcliffe-Trenner's presentation complemented Curt's perfectly While Curt focused on using database technology to help manage, Annabelle focused on human organizational methods. Annabelle started with the assertion that 'you have to understand what you have to maintain it'. Therefore, she encouraged the group to establish a baseline for planned maintenance that included:

Historic documentation Inventory of Building Materials Chronology of Construction

She recommended that good drawings be labeled with dates of construction. She encouraged the use of simple charts such as a cleaning schedule.

Daily	Weekly	Monthly	Quarterly	Semi-Annual	Annual

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Cheryl Sams from the National Park Service's Northeast Region.

IN CONTEXT: PRESERVING YOUR HISTORIC LANDSCAPE

Cheryl Sams, Historical Landscape Architect and Northeast Cultural GIS Coordinator, provided participants with a broad overview of cultural landscape issues amply illustrated with arresting visual examples. Cheryl assured an audience of very busy people that they 'didn't need to buy big books' to familiarize themselves with the principles of cultural landscape preservation. The National Park Service's Preservation Brief #36 by Charles Birnbaum is excellent.

In her presentation, she described landscape types from designed works of art such as the Mall in Washington D.C. to ethnographic landscapes such as the Martin Luther King site in Atlanta. Always accompanied by rich visuals, Cheryl followed with delineating the steps in identification and documentation of the significant elements of historic landscapes and appropriate preservation treatments.



The photo of the historic landscape that encompasses Independence Hall, the centerpiece of Independence National Historical Park is just one example of the photos used in Cheryl's powerpoint presentation. Her entire powerpoint and referenced materials are available at www.nps.gov/nero/princeton. The visual examples of concepts such as spatial organization, topography, circulation, and small scale elements are particularly helpful in understanding the elements that should be considered in historic landscape preservation.

Annabelle Annabelle Radcliffe-Trenner (below) led the final event of the Conference. Attendees were treated to a look at Morven, a NHL that from 1954-1982 was New Jersey's Governor's mansion.



Lisa Kolakowsky from the National Park Service's Northeast Region, Julie Polanco of the Presidio Trust, and Bill Traubel of Princeton University led a dedicated conference staff to make the Princeton Conference a resounding success. The terrific speakers whose contributions are summarized above were, of course, critical as well. Behind-thescenes the work in planning the sessions and preparing the conference materials was done by Bill Brookover, Bill Bolger, Catherine Turton, and Jennifer Gates who are part of the Northeast Region's Preservation Assistance Group along with Bonnie Halda, group manager. Without them there wouldn't have been a conference. Monita Baxter who works for Preservation Assistance under contract manned the registration table and was essential to keeping the conference logistics on track. This conference overview and the summary materials on the conference web pages include contributions from Bill Brookover, Catherine Turton, and Jennifer Gates compiled by Linda Seifert of the Northeast Region's Planning and Partnerships Directorate. Special thanks go to Scott Doyle of the Pennsylvania State Historic Preservation Office who pitched in and helped out with Conference 'reporter' duties.



March 17, 2004